



How to Assign a Preparer

Step 1



From the CalATERS web site at

www.calaters.ca.gov, click

CalATERS

Step 2

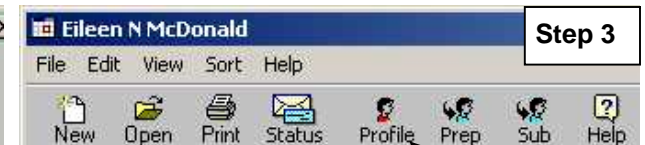


Key User ID and Password.

Click

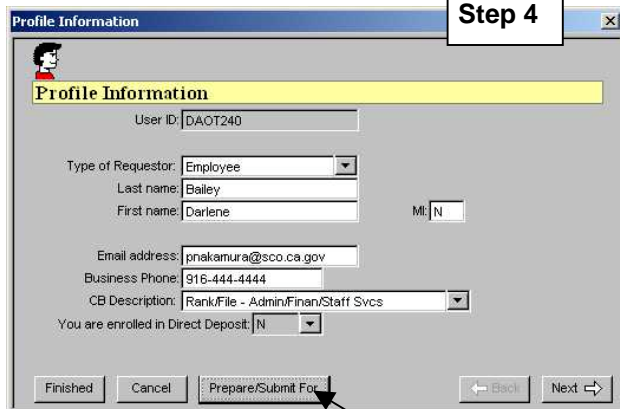
Sign In

Step 3



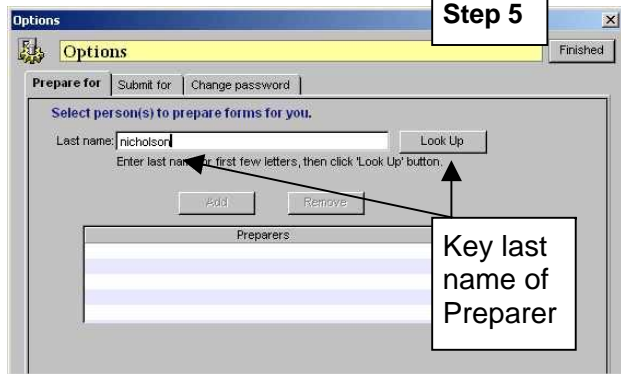
The Work Queue screen will display. On the top of the Work Queue screen, click on the Profile icon.

Step 4



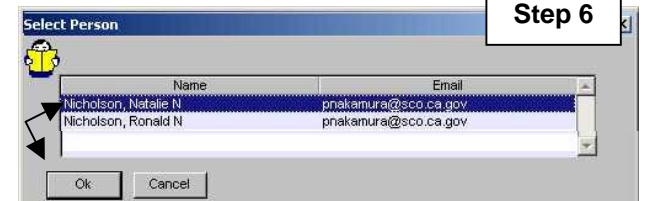
Profile screen will display. Click on Prepare/Submit For button.

Step 5



Options screen will display. Key the name of the Preparer in the Last Name field then click on Look Up.

Step 6



One or more employees matching the last name will display. Click on your preparer's name, then click Ok.

If names match use the email address to determine the correct preparer.



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Step 7

Options

Prepare for | Submit for | Change password | Finished

Select person(s) to prepare forms for you.

Last name: Nicholson Look Up

Enter last name or first few letters, then click 'Look Up' button.

Natalie N Nicholson

Add Remove

Preparers

Verify name of selected Preparer and click Add button.

Verify the name identified on the screen then click

Step 8

Options

Prepare for | Submit for | Change password | Finished

Select person(s) to prepare forms for you.

Last name: Look Up

Enter last name or first few letters, then click 'Look Up' button.

Remove

Preparers

Natalie N Nicholson

Preparer's name appears in the Preparers box. Repeat Steps 5, 6 and 7 if assigning additional preparers. When completed click

Step 9

Profile Information

User ID: DAOT240

Type of Requestor: Employee

Last name: Bailey

First name: Darlene

MI: N

Email address: pnakamura@sco.ca.gov

Business Phone: 916-444-4444

CB Description: Rank/File - Admin/Finan/Staff Svcs

You are enrolled in Direct Deposit: N

Finished Cancel Prepare/Submit For Back Next

Click

The Preparer (s) you have authorized will now be able to prepare a request on your behalf.